

Health Savings Account (HSA) Pricing Guide

(Supplement to the Health Savings Account (HSA) Custodial Agreement and Disclosure)

Monthly Maintenance Fee*	\$1.95
Monthly Sweep Investment Sub-Account Fee**	See Below
Monthly Brokerage Sub-Account Fee***	See Below
Debit Card Replacement Fee	\$5 Account
Closing or Transfer Fee	\$25

Other Charges – Dependent on need there may be additional charges required for research, wires, special statements, letters, and other special requests not contemplated in the normal administration of accounts. A quote will be provided before work commences.

* Monthly maintenance fee may be paid by your employer if applicable.

* Truist Wealth Client fees are waived if you have Wealth checking account.

** Subject to change in accordance with the terms of this Agreement, a custodial management fee will be deducted from your Sweep Investment Sub-Account equal to one-sixteenth of one percent (.0625%) per quarter or equal to an annual fee of one-quarter of one percent (.25%) on balances invested in mutual funds in your Sweep Investment Sub-Account. Other fees may apply for mutual fund investments, as described in the prospectuses. A minimum balance of \$2,100 is required to open a Sweep Investment Sub-Account.

*** Fees may apply for investments and trades, as described in the Brokerage Agreement. A minimum balance of \$2,000, plus a balance in your Investment Sub-Account, is required to open a Brokerage Sub-Account.

Mutual Fund Investments: Please consult the HSA Custodial Agreement and Disclosure for information concerning fees, expenses and dividends on the Mutual Fund Investment Options.

Brokerage Sub-Account Investments: Please consult the Brokerage Agreement for information concerning fees and expenses relating to investments and trades made via the Brokerage Sub-Account.

Neither the Custodian or TPA nor their representatives offer tax or legal advice. Please consult your tax or legal professional regarding your individual circumstances.

Contact information:

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For Mutual Fund Investments, please consult the HSA Custodial Agreement and Disclosure for information concerning fees, expenses and dividends on the Mutual Fund Investment Options. For Brokerage Sub-Account Investments, please consult the Brokerage Agreement for information concerning fees and expenses relating to investments and trades made via the Brokerage Sub-Account.

Your HSA funds may be held in a custodial deposit account at Truist Bank. While so deposited, the funds are FDIC-Insured to the extent provided by law. Securities, insurance and advisory products or services including mutual fund investments made through your Sweep Investment Sub-Account and investments in securities made through your Brokerage Sub-Account are NOT A DEPOSIT NOT FDIC-INSURED NOT GUARANTEED BY A BANK NOT INSURED BY STATE OR FEDERAL GOVERNMENT AGENCY MAY GO DOWN IN VALUE.

Truist and its representatives do not offer tax or legal advice. Please consult your tax or legal professional regarding your individual circumstances. Truist Bank, member FDIC and Equal Housing Lender. To learn more, visit Truist.com.

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